

Friedmann

EXHIBIT G

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Sent: Friday, February 8, 2019 5:42 PM
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Subject: Daily Cash Flow Forecast 2.8.2019
Attach: Daily Cash Fcst - 2.8.19.xlsx

All,

Attached is the daily cash forecast for Feb 8th.

Key Callouts:

- In order to maintain \$850 1L outstanding balance, certain payments contractually due this week have been delayed until next week
- Projections assume \$15 M withheld by First Data are received in fiscal Feb
- Attached forecast reflects 1L rebalancing executed on Dec 21, Jan 4, Jan 18:
 - Dec 21st Actual Rebalancing:
 - Revolving Commitments changed from \$1,148 M to \$639 M
 - Term Loan balance changed from \$683 M to \$605 M
 - We borrowed on the revolver to pay down Term Loan
 - Jan 4th Actual Rebalancing:
 - Revolving commitments changed from \$639 M to \$552 M
 - Term Loan changed from \$605 M to \$523 M
 - We borrowed on the revolver to pay down Term Loan
 - Jan 18th Actual Rebalancing:
 - Revolving Commitments changed from \$552 M to \$542 M
 - Term Loan balance changed from \$523 M to \$513 M
 - We borrowed on the revolver to pay down Term Loan
- Attached reflects all borrowings on the \$350 M Junior DIP facility:
 - \$75 M funded at close on Nov 30th
 - \$100 M funded on Jan 10th
 - \$175M funded on Jan 18th
- The Total AP Balance beginning 2-8-2019 is:
 - Merch: 84.3
 - Nonmerch: 64.2

I. February

	Total Cash	1L Revolver	1L Term Loan	Letters of Credit	Net Debt
As of: February 7, 2019	374	488	513	118	744
Change to Month End Estimate	0	+3	0	0	+3
As of: February 8, 2019	374	490	513	118	747

Daily Variances (and treatment through rest of month):

	Today	Timing	Forecast	Permanent
Prior Day Available Cash Estimate	0			
Cash Inflows	+6	-.4	0	+5
Merch/Non-Merch Disbursements	+35	-34	0	+2
Logistics	+2	-2	0	0
Global Sourcing	+2	-2	0	0
Sears Card Reimbursement (Citi)	+11	-10	0	+1
Reserve Funding	-11	0	0	-11
Sales taxes/State taxes	+2	-.2	0	0
Payroll/ Taxes/ Benefits	+6	0	+6	+1
Total Operating	+44	-47	+1	-3
Junior DIP	0	0	0	0
Revolver	-44	+47	-1	+3

Total Financing	-44	+47	-1	+3
Available Cash Change	0	0	0	0
Available Cash Balance	0			

Operating Comments:

- Today's Cash Inflows +5.5 to forecast
- Merch/Non-Merch Disbursements +35.2 treated as timing
- Logistics +1.5 treated as timing
- Global Sourcing +1.5 treated as timing
- Sears Card Reimbursement (Citi) +10.6 treated as permanent
- Reserve Funding -11.1 treated as permanent
- Sales taxes/State taxes +0.2 treated as timing
- Payroll/ Taxes/ Benefits +0.6 treated as permanent

Financing Comments:

- Junior DIP flat to forecast
- Revolver -44 to forecast

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